

TRACS Technical Update

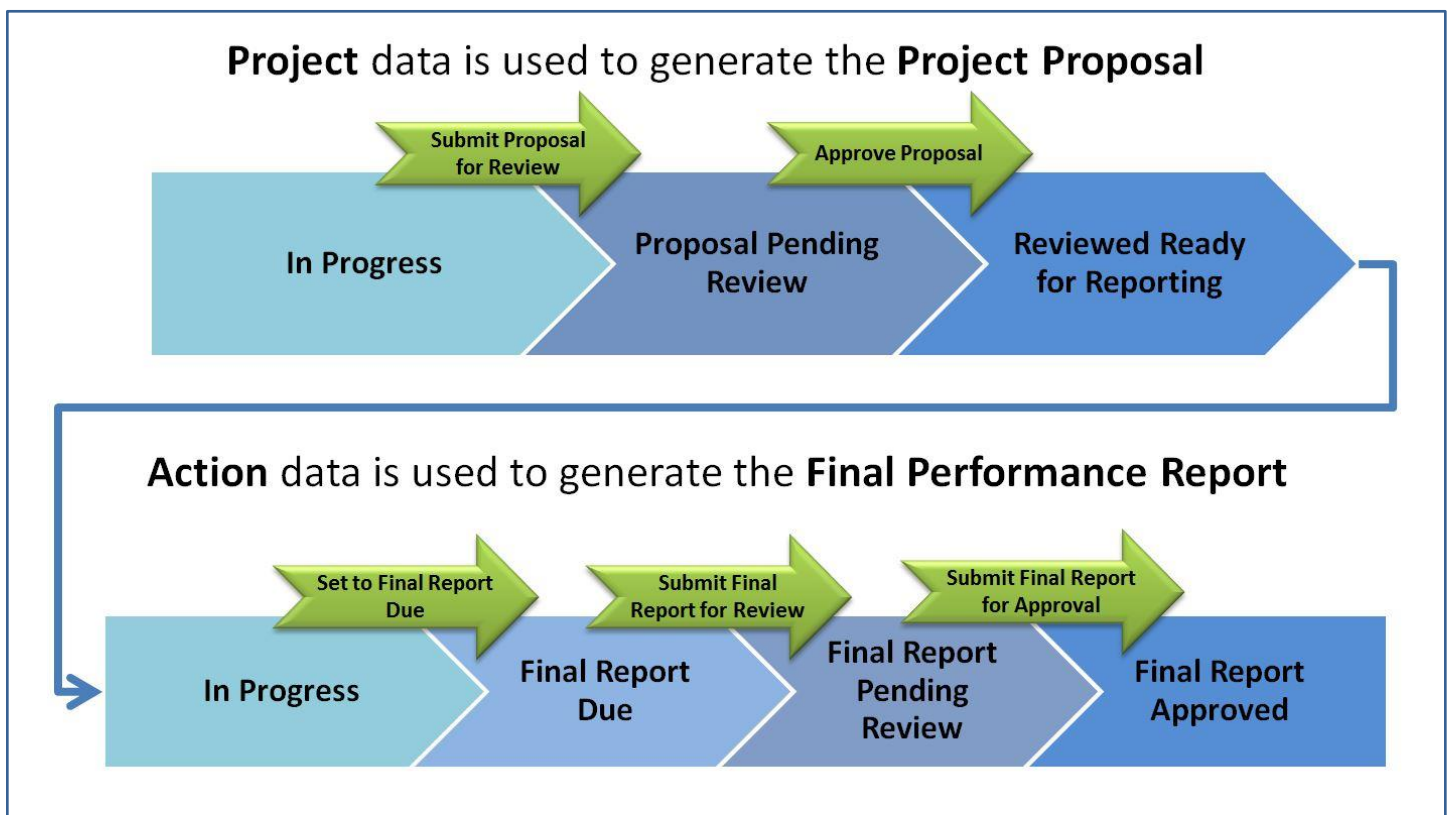
October 14th 2015

Sprint/Release 1.10

On October 14th 2015, the TRACS team released version 1.10 which includes enhancements to the TRACS system (production and training) derived from high priority issues determined by users and prioritized by the TRACS Working Group. This document provides an overview of the visible changes to the workflow manager and approval process. Note: behind-the-scenes improvements have also been implemented that speed up processes and improve reporting functions.

Streamlined Approval Steps

- The approval process for both project proposals and performance reports has been streamlined with the removal of the peer review and state approval steps.
- The new **“bare bones” set of steps and transitions** make it easier for you to submit and approve projects in TRACS. Note: All existing projects were moved to this simplified workflow and user roles have not changed.



- Federal approvers now have the option to **rescind approval for the final report** instead of going through the help desk.
- More detailed information about the new workflow is available on the [Guidance FAQS Workflow page](#). Also, check out the updated videos: [Lesson 6 Generating your Project Proposal video](#) and [Lesson 10 Submitting your Final Performance Report video](#).

Improved Reporting Processes

- Interim performance reports no longer have a workflow and they are no longer saved in the system as a static report. Instead, you can generate **live/ad-hoc interim reports using the Workflow Manager**. These reports are more dynamic and can be generated for a standard period of performance or custom date range.
- **Final reports** are no longer based on only the final performance period; instead they are now generated as a **comprehensive report** that includes ALL performance data (addressed objectives, actions, costs, etc.) Performance data is only locked for editing after submission of the Final Report.
- **More options are available to view or download proposals and reports before approval.** HTML and PDF formats are available to preview while the project is in progress and the finalized PDF version is available once approved.
- The workflow forms have been updated to provide more **user hints, validation messages and general usability improvements**.
- The **status of the action now impacts the report that can be generated** (interim or final). In order to include an action in an interim report, it must have a status of "Active". In order to include an action in a final report, it must have a status of "Complete".
- The new **View Addressed Objectives Viewer** allows you to view objectives that will be included in your report and see validation information. The addressed objectives do not need to validate before running an interim report, but they must validate before the final performance report can be submitted.

Enhanced Workflow Manager (WFM)

- The WFM has been overhauled with a new layout which provides a lot more user-friendly functionality and better performance than the previous version.
- The WFM has new **filter-based search options** (similar to mapper filters) and an **indexed, real-time results** window with more **customization options for displaying and sorting content**. The new **Export button** allows you to download the list to an Excel spreadsheet.
- The WFM now has better **batch management**. The concept of “bundle” was removed. The **Manage Selection** button allows you to send multiple projects through the workflow (as long as they have the same status and meet validation rules).
- More detailed information on the WFM is available in the [User Guide Workflow Manager chapter](#). Also, check out the new [Lesson 20 Workflow Manager video](#).

Note: Online reference materials (including the User Guide, Guidance FAQs and Training Videos) have been updated to reflect the changes in Release 1.10. Please visit the TRACS Knowledge Management Site (KMS) for up-to-date information: <https://tracs.fws.gov/learning/>